

CANADIAN  
BUSINESS  
HISTORY  
ASSOCIATION



5 Years

L'ASSOCIATION  
CANADIENNE  
POUR L'HISTOIRE  
DES AFFAIRES

# PROGRESS REPORT

## 2022



The **Canadian Business History Association-l'association Canadienne pour l'histoire des affaires** has had a very successful 2022, capped by the completion of a major national fundraising campaign.

In May of 2021, the L.R. Wilson Foundation awarded the CBHA/ACHA \$1 million in funding, with an additional \$1 million if the Association raised a matching \$1 million in funding towards its endowment. On July 25, 2022, the CBHA/ACHA announced that it had met its fundraising goal, and that the Association's \$3 million Endowment campaign had been successfully completed. A great thank you to all our donors, and especially the L.R. Wilson Foundation.

The CBHA-ACHA looks forward to more events and outreach in 2023, and we encourage all historians whose work intersects with business, the economy, consumption, technology, or any related subjects to consider joining our organization. To this point our mission has been to Preserve and to Present. With additional resources we can now go further. We will expand our mission to also Engage the business community, the educational community, and society at large on the importance of understanding business history and its vital contribution to Canadian society.

Dimitry Anastakis  
Chair

Joe Martin  
President

The **CBHA/ACHA's** objectives include:

### **To Preserve**

- Improve the quality, quantity, and access to Canadian business history material and archives.
- To establish a central site, or have archival expertise available, for the study of Canadian business history.

### **To Present**

- Make Canadian business history more accessible to the general public.
- Support academic and scholarly research and publication on Canadian business history both domestically and internationally.

### **To Engage**

- Encourage the study of business history in academic institutions in Canada.
- Accelerate the presentation and dissemination of relevant corporate histories, industry histories, and business leadership biographies.

To meet these objectives, the CBHA/ACHA will actively recruit new members and operate with the highest standards of governance and corporate responsibility.

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# THE YEAR IN REVIEW

The **CBHA-ACHA** had a material impact in the field of Canadian business history in 2021/2022:

- Continued with its series of online virtual presentations **CBHA-ACHA Talks** on topics relevant to Canadian business history.

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- Grew to **215 individual members** from the academic, archivist, business leader, junior scholar, and general public communities, **an increase of 10%**.

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- Successfully concluded a **\$3 million endowment campaign** to ensure the future stability of the organization.

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- Maintained a leading-edge website and an on-line **YouTube Channel** with archived **CBHA/ACHA** video presentations.

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- Published **The Prospectus**, a monthly newsletter with over 2,000 Canadian and international subscribers.

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- Awarded the third **Chris Kobrak Research Fellowship** with a prize of \$10,000 over two years, and the **Best Article in Canadian Business History Award** with a prize of \$1,000.

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- Provided **\$15,500 in grants, scholarships and sponsorships** to its members and associated organizations to advance the study of Canadian business history.

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- Partnered with *Canada's History Magazine* to offer a **one-year complimentary subscription** to new members of the CBHA-ACHA.

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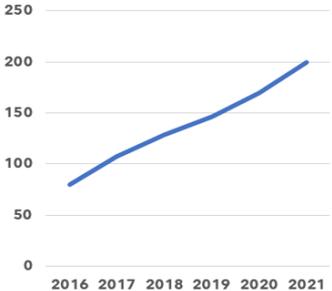
- Jointly awarded the inaugural **Desautels Research Fellowship** of \$1,000 in partnership with the Marcel A. Desautels Centre for Private Enterprise and the Law at the University of Winnipeg

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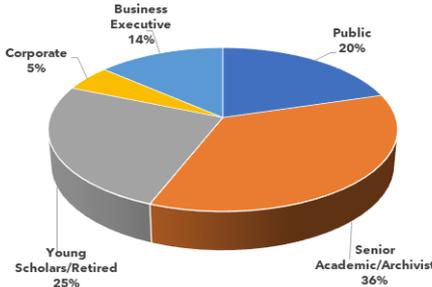
- Participated in several in-person and virtual **academic and archivist conferences**.

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# Membership Growth



# Membership Categories



# Financial Results





The **CBHA/ACHA** and the Marcel A. Desautels Centre for Private Enterprise and the Law at the University of Winnipeg announced that **Jean-Philip Mathieu** was awarded the 2022 Inaugural **Desautels Research Fellowship**. This award was given in support of his research project *A Social History of Montreal Rolling Mills, 1868 to 1903*.

The **CBHA-ACHA** continued to provide engaging online **CBHA-ACHA Talks** bringing academic historians, business leaders, and the general public together for a series of wide-ranging, interactive and well-attended presentations and discussions. All are available on the Association's YouTube Channel. These presentations included:

- *A Look Backwards at Canada's Forest Products Industry*, moderated by Jeremy Mosher with panelists Professor Michael Stamm, Martin Fairbank and Mike Reid.
- *Key Events in Canadian Mining History* with Deborah McCombe, Moderator, and Panelists Dr. Jacqueline Allison, Glenn Nolan, Dr. John Sandlos and Jane Werniuk.
- *From Wall Street to Bay Street: Documentary Preview and Discussion*, Joe Martin and Kevin Feraday.
- *Fortunes and Family Feuds: The Chequered History of Family-Owned Public Companies*, with Professor Dimitry Anastakis, Rod McQueen and Gord Pitts.
- *The CP/KCS Railway Transaction and the History of the Railroad Industry*, moderated by Howard Green with panelists Tom Murray, Professor George Lovegrove and Cameron Doerksen.

The **CBHA/ACHA** successfully completed its \$3 million Endowment Funding campaign. In 2020, the Wilson Foundation committed \$2 million to the **CBHA/ACHA** by way of the new **Wilson Foundation Endowment for the Study of Canadian Business History**. The first \$1 million of the endowment was immediate while the second \$1 million was triggered by matching donations. Projects supported includes support for students, events, the digitization of historical documents, and more biographies of Canadian business leaders.

**Nicholas Fast** was announced as the recipient of the 2022-23 **CBHA/ACHA Chris Kobrak Research Fellowship in Canadian Business History**.



Nicholas is a PhD candidate in History at the University of Toronto whose area of interests lie in unionism in the Canadian meatpacking industry; labour and economic history; social movement. During his tenure as Research Fellow, Nicholas Fast will continue his comparative, transnational study of the process of deindustrialization and technological change in meatpacking business practices.

**Professor Michel Dahan** was announced as the 2022 recipient of the **CBHA/ACHA Best Article in Canadian Business History** for his article published in the *Canadian Historical Review*: "Tout le monde voyage : l'agence Hone & Rivet et les débuts de l'industrie touristique au Canada (1894-1939)."



Its main historical significance is revealing the transnational linkages shaping Canadian tourism in Europe at this time, as well as the business enterprise that enabled such travel. Professor Dahan is with the Université de Montréal / Faculty of Arts and Science Department of History.

The **CBHA-ACHA** has created a new Charitable Endowment Account for its Awards and Scholarships through *The Veritas Foundation Giving Fund*. The income from the CBHA/ACHA Awards Fund will be used to provide monetary grants, bursaries and awards. You can contribute to this venture at:

<https://cbha-acha.ca/index.php/donate/>

### Affiliated Organizations



# PLANS FOR 2023

## **Continue to present its monthly online *CBHA-ACHA Talks Series***

This series of webinar talks originated during the global health pandemic and includes speakers and researchers on a variety of topics relevant to Canadian business history.

## **Organize an Annual Conference in Winnipeg**

The conference will present research and opinion on business activity in the *Roaring Twenties* with a comparative analysis to the contemporary economy.

## **Announce new projects funded by the *Wilson Foundation Endowment for the Study of Canadian Business History***

As a result of endowed funding, the **CBHA-ACHA** will be presenting new initiatives and partnerships to advance the study of Canadian business history.

## **Award the fourth *CBHA-ACHA Best Book in Canadian Business History Award*.**

A bi-annual prize of \$10,000, the prize committee encourages the submission of books from all methodological perspectives.

## **Award Grants, Scholarships and Sponsorships**

Continue to provide financial assistance to **CBHA-ACHA** members to attend conferences and workshops, conduct events related to business history, and publish research material.

## **Award the *CBHA-ACHA Best Article in Canadian Business History***

This annual award encourages innovative studies in Canadian business history that have the potential to expand the boundaries of the discipline.

## **Award the inaugural *CBHA-ACHA Best Undergraduate Article Award in Canadian Business History*.**

This \$1,000 will be awarded annually to a student in a post-secondary institution.

**Award the annual Desautels Research Fellowship** with partner the Marcel A. Desautels Centre for Private Enterprise and the Law at the University of Winnipeg.

# LEADERSHIP



**Dimitry Anastakis**, Chair of the Board. Professor, University of Toronto, Department of History.

**Joe Martin**, President and Member of the Board of Directors.



**Donica Belisle**, Member of the Board of Directors. Associate Professor, University of Regina.

**Mark S. Bonham**, Secretary-Treasurer and Member of the Board of Directors. Executive Director, The Veritas Foundation.



**Tabitha Fritz**, Member of the Board of Directors. CEO, Fritz's Cannabis Company.

**Jeremy Mosher**, Member of the Board of Directors. Director of Equity Sales, National Bank Financial.



**Don Nerbas**, Member of the Board of Directors. Associate Professor, McGill University.

**J. Andrew Ross**, Member of the Board of Directors. Manager, Library & Archives Canada.



**Jason Russell**, Member of the Board of Directors. Associate Professor, Empire State College, State University of New York.

**M. Stephen Salmon**, Member of the Board of Directors. Library & Archives Canada (Retired).



**Mona Zhang**, Member of the Board Of Directors, Associate Portfolio Manager, Mackenzie Investment Management

# FINANCIAL STATEMENTS

## Statement of Financial Position As at September 30<sup>th</sup>

	2022	2021
<b>ASSETS</b>		
<b>CURRENT</b>		
Cash	\$ 3,457	\$ 647
Prepaid Expenses	3,340	3,300
Accounts Receivable	223	223
Funds Held in Trust	2,640,436	1,014,219
<b>TOTAL ASSETS</b>	<b>\$ 2,647,456</b>	<b>\$ 1,018,389</b>
<b>LIABILITIES</b>		
<b>CURRENT</b>		
Accounts Payable & Accrued Liabilities	\$ 2,750	\$ 2,000
Book Award	10,000	10,000
<b>TOTAL LIABILITIES</b>	<b>\$ 12,750</b>	<b>\$ 12,000</b>
<b>NET ASSETS</b>		
General Fund	\$ 634,706	\$ 6,389
Restricted Fund	\$2,000,000	\$ 1,000,000
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$2,647,456</b>	<b>\$ 1,018,389</b>

**Statement of Operations**  
**Year Ended September 30<sup>th</sup>**

	<b>2022</b>	<b>2021</b>
<b>REVENUES</b>		
Membership Fees	\$ 24,301	\$ 20,075
Book Sales	76	-
Donations	631,118	14,306
Book Prize Sponsorship	-	10,000
	<b>\$655,495</b>	<b>\$ 44,381</b>

**EXPENSES**

Accounting & Legal	\$ 2,400	\$ 1,500
Advertising	5,417	918
Bank Charges	621	625
Computer Services	1,320	1,432
Grants, Awards & Sponsorships	9,983	17,210
Insurance	920	800
Office and General	2,785	2,088
Conference Expense	3,259	475
Travel	473	-
	<b>\$ 27,178</b>	<b>\$ 25,048</b>

**Excess (Deficiency) of**

<b>Revenues over Expenses</b>	<b>\$628,317</b>	<b>\$ 19,333</b>
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CHARTER CORPORATE MEMBERS



**Canadian Business History Association**

**l'association canadienne pour l'histoire des affaires**

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[www.cbha-acha.ca](http://www.cbha-acha.ca)

[www.cdnbiz150history.ca](http://www.cdnbiz150history.ca)